



# WYOMING OFFICIAL TRAVELERS JOURNAL 2013

## SURVEY OF JOURNAL REQUESTORS

### Report of Findings

March 2014



## Research Overview & Objectives

This report presents the findings of a survey of requestors of the 2013 Wyoming Official Travelers Journal. This research was conducted on behalf of the Wyoming Office of Tourism and its marketing partner, Miles. The primary objectives of this research were to:

- Understand the usage of the 2013 Wyoming Official Travelers Journal in visitors' travel-planning process and decision making
- Study visitors' behavior both prior to Wyoming their trip and while in-market
- Develop a profile of those who used the Official Travelers Journal

## Research Methodology

- This research is based on an online survey methodology
- Destination Analysts conducted this research on the 2012 Wyoming Official Travelers Journal at the end of 2012. For comparability purposes, Destination Analysts used essentially the same questionnaire but updated it for the 2013 Journal
- Those who requested the 2013 Wyoming Official Travelers Journal during calendar year 2013 were sent an email invitation to complete the survey
- The survey was fielded January 27<sup>th</sup> – February 24<sup>th</sup>
- Respondents who did not visit Wyoming after receiving the Journal completed the survey's demographic questions

## Research Methodology (continued)

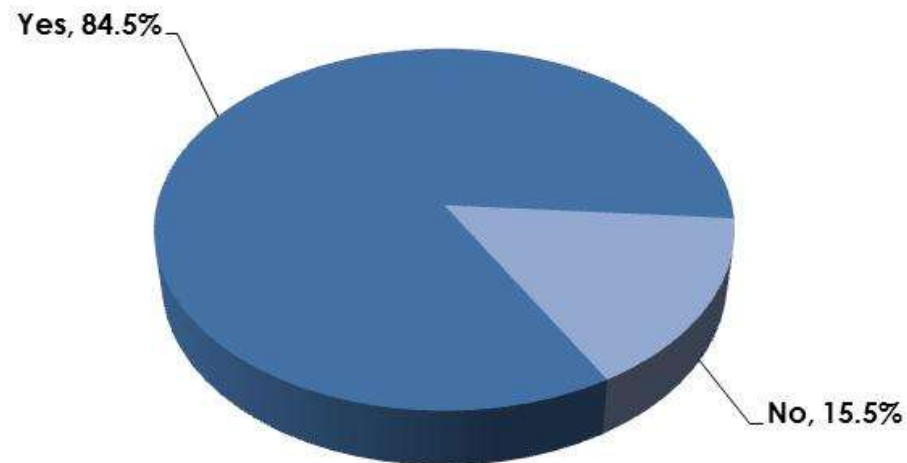
- 84,856 email invitations were sent to Journal requestors
- The email invitation yielded a total of 9,035 completed survey responses
- The response rate is 10.6%
- Of the 9,035 survey responses, 3,869 respondents (42.7%) visited Wyoming after receipt of the Journal and thus completed the full survey

## DETAILED SURVEY RESULTS

## Recall Receipt of Official Travelers Journal

84.5 percent of survey respondents recalled receiving a copy of the 2013 Wyoming Official Travelers Journal in the mail.

**Chart 1: Recall Receipt of Official Travelers Journal**



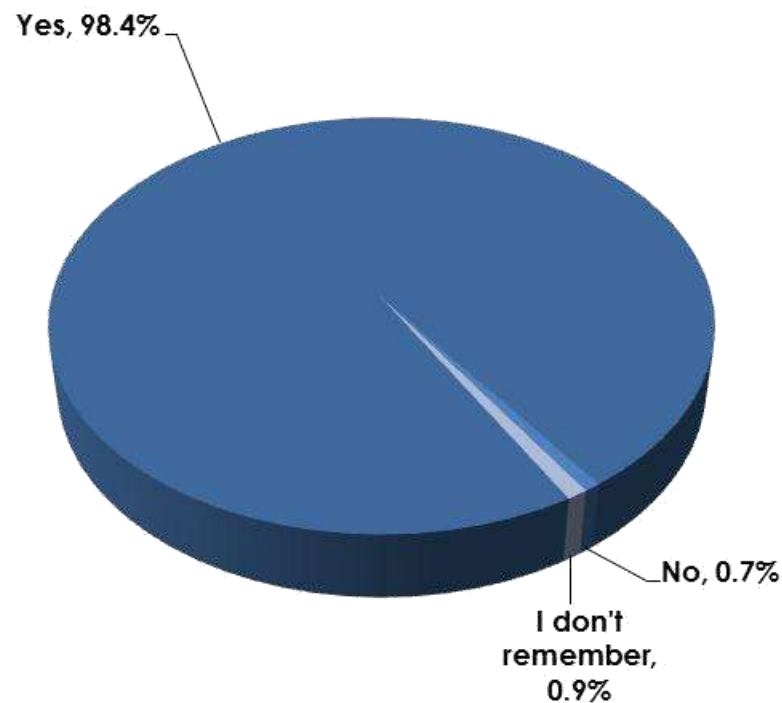
Question: Do you recall receiving a copy of the 2013 Wyoming Official Travelers Journal in the mail? Base: All respondents. 9,035 completed surveys.

## Reviewed Journal

Respondents who recalled receiving the Wyoming Official Travelers Journal were asked if they read or looked through it. Nearly all of this group indeed reviewed the Journal (98.4%).

**NOTE:** In the remainder of this report, survey respondents who recall receiving the 2013 Wyoming Official Travelers Journal and read through it are referred to as “Journal users.”

Chart 2: Reviewed Journal



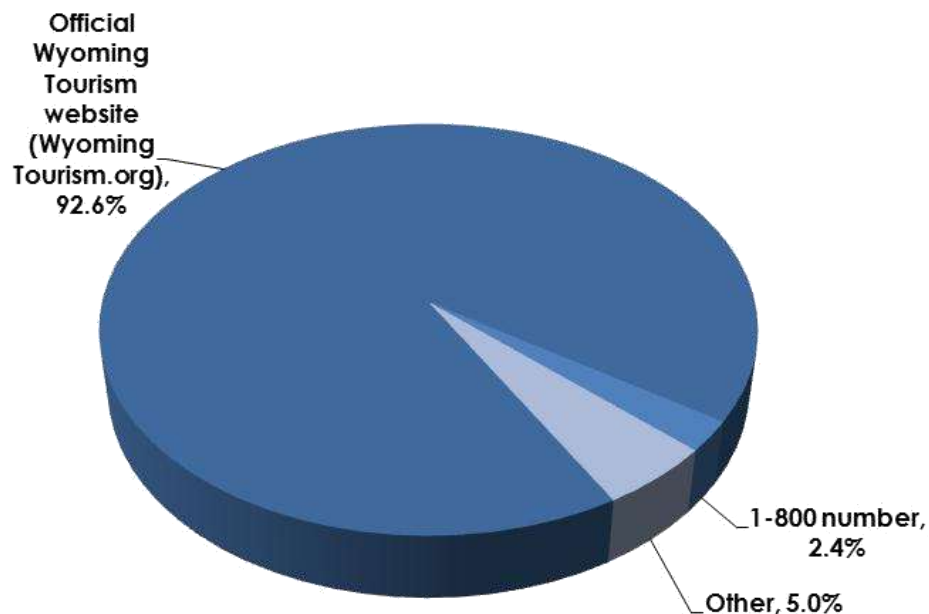
Question: Did you read (or look through) the 2013 Wyoming Official Travelers Journal that you received? Base: Respondents who recall receiving the Journal. 7,634 completed surveys.



## Method of Requesting Journal

Journal users were asked to report how they requested the Journal. These requests are predominately made online. Over 90 percent requested the guide through the Official Wyoming Tourism website, WyomingTourism.org (92.6%). 2.4 percent requested the Journal through the 1-800 number.

**Chart 3: Method of Requesting Journal**



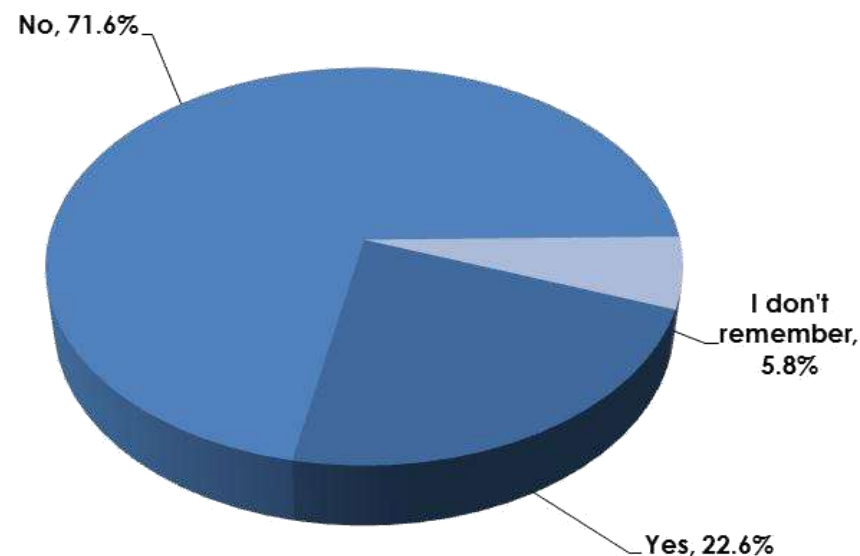
Question: How did you request the Wyoming Official Travelers Journal? (Select one).  
Base: Journal users. 7,517 completed surveys.



## Use of Journal in Previous Years

Although the majority were first-time requestors, approximately one in five (22.6%) 2013 Journal users had requested a Wyoming Official Travelers Journal in previous years.

**Chart 4: Use of Journal in Previous Years**

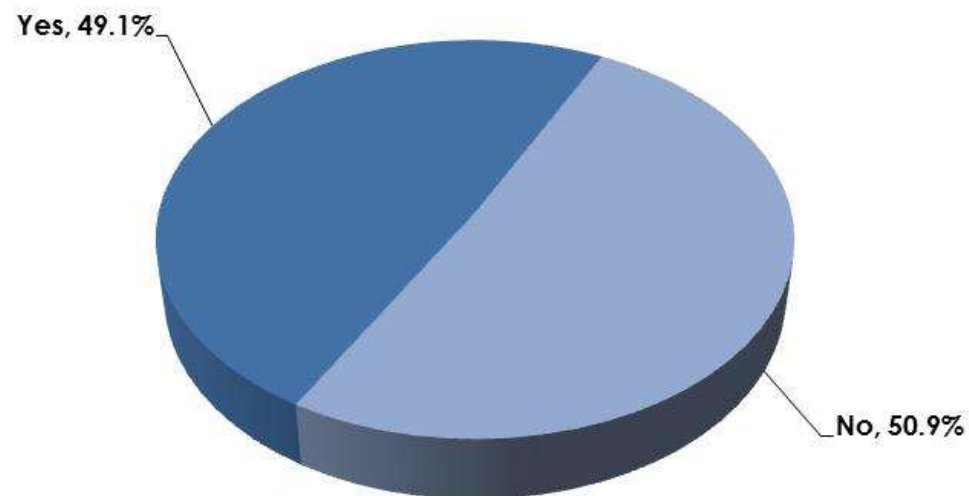


Question: Excluding the 2013 Wyoming Official Travelers Journal you received this year, have you requested or used a Wyoming Official Travelers Journal in previous years? Base: Journal users. 7,517 completed surveys.

## Visited Wyoming after Receiving Journal

Approximately half of 2013 Wyoming Official Travelers Journal users made a trip to Wyoming after receiving this guide (49.1%).

**Chart 5: Visited Wyoming after Receiving Journal**

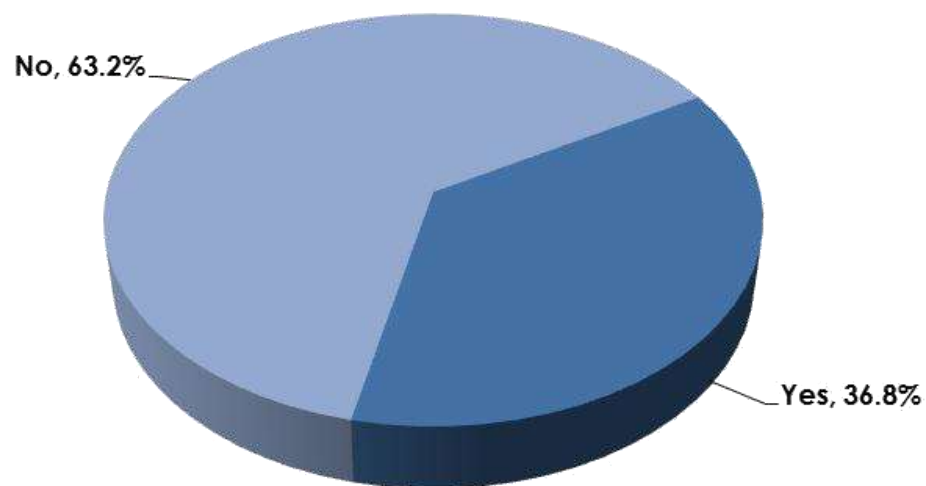


Question: Since receiving the 2013 Wyoming Official Travelers Journal have you visited Wyoming? Base: Journal users. 7,517 completed surveys.

## Future Wyoming Travel Plans

Journal users who had not yet visited Wyoming after receiving the 2013 Wyoming Official Travelers Journal were asked if they had travel plans for a future Wyoming trip. Over one third confirmed that they have firm plans to visit Wyoming (36.8%).

**Chart 6: Future Wyoming Travel Plans**

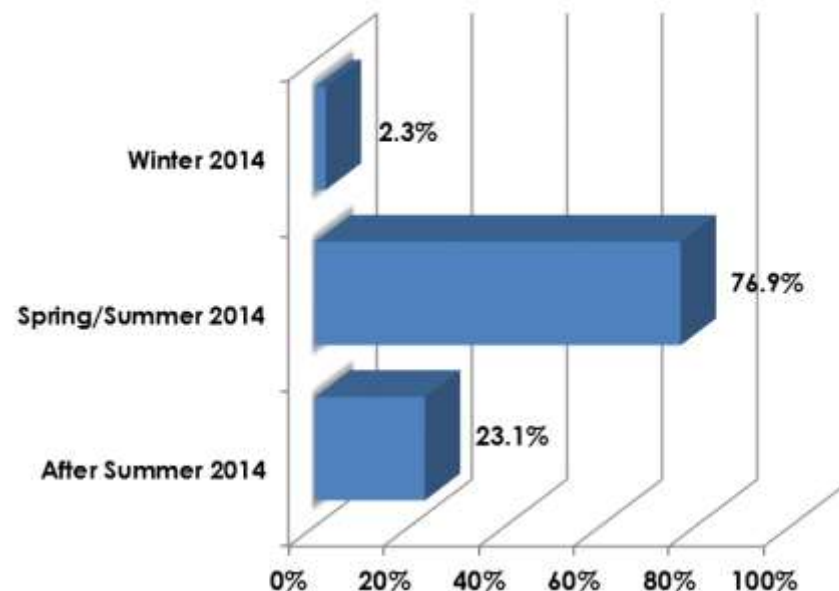


Question: Have you made any firm travel plans for a trip to Wyoming yet? Base: Journal users who did not travel to Wyoming after receiving the Journal. 3,827 completed surveys.

## Intended Wyoming Visit

Journal users who had not traveled to Wyoming after receiving the Journal but have firm plans for a future Wyoming trip were asked when they intend to visit the state. The majority of this group, 76.9 percent, will visit Wyoming in the Spring or Summer of 2014. About one quarter intend to visit sometime after the Summer.

**Chart 7: Intended Wyoming Visit**

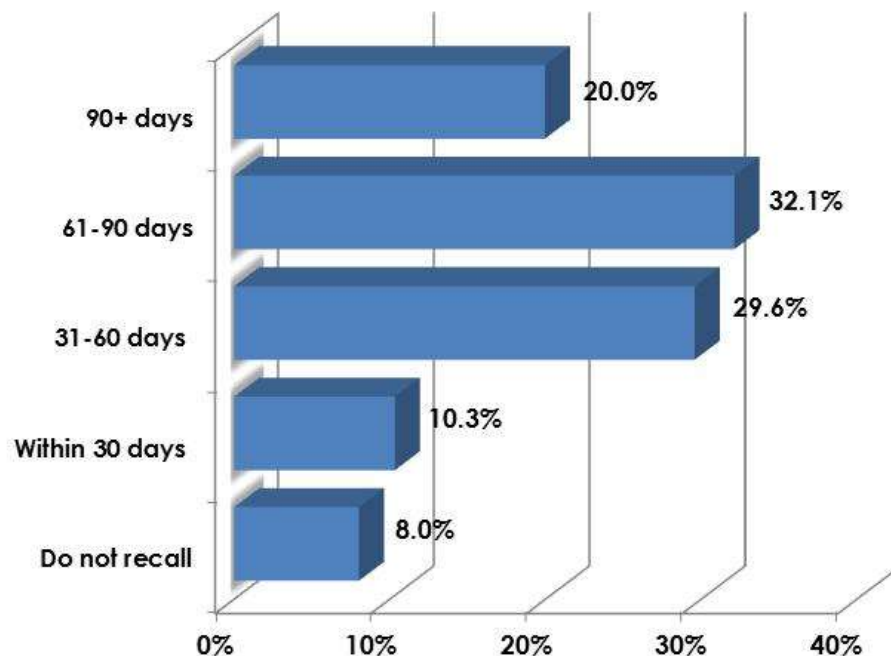


Question: When do you plan to visit Wyoming? (Select all that apply). Base: Journal users who did not travel to Wyoming after receiving the Journal, but have firm plans for a future Wyoming trip. 1,405 completed surveys.

## Wyoming Visit After Receipt of Journal

Journal users who visited Wyoming after receiving the 2013 Journal were asked to report when they made their visit. Journal users tend to travel between 1 and 3 months from when they receive their guide (61.7%). The largest proportion of Journal users visited Wyoming 61-90 days after receiving the Journal (32.1%), closely followed by those Journal users who traveled 31-60 days after receipt of the Journal. One in five came to the state 90 or more days after receipt of the 2013 Journal (20.0%); conversely, one in ten came within 30 days of receiving the Journal (10.3%).

**Chart 8: Wyoming Visit After Receipt of Journal**

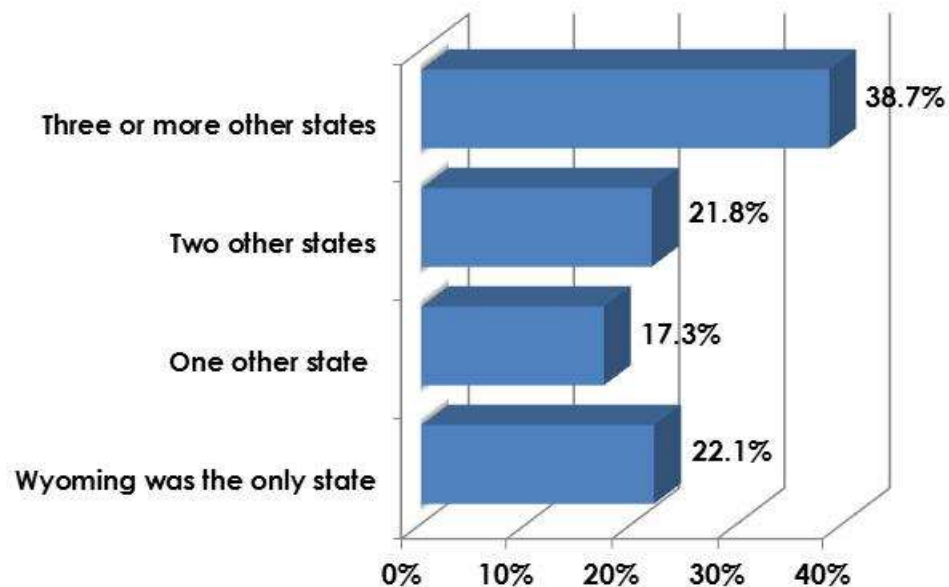


Question: How long after receiving your 2013 Wyoming Official Travelers Journal did you visit Wyoming? (Select one). Base: Journal users who visited Wyoming after receiving the Journal. 3,692 completed surveys.

## Other States Considered for Trip

While the majority of Journal users considered one or more other states for their trip (77.9%), 22.1 reported Wyoming to be the only state considered for this trip.

**Chart 9: Other States Considered for Trip**



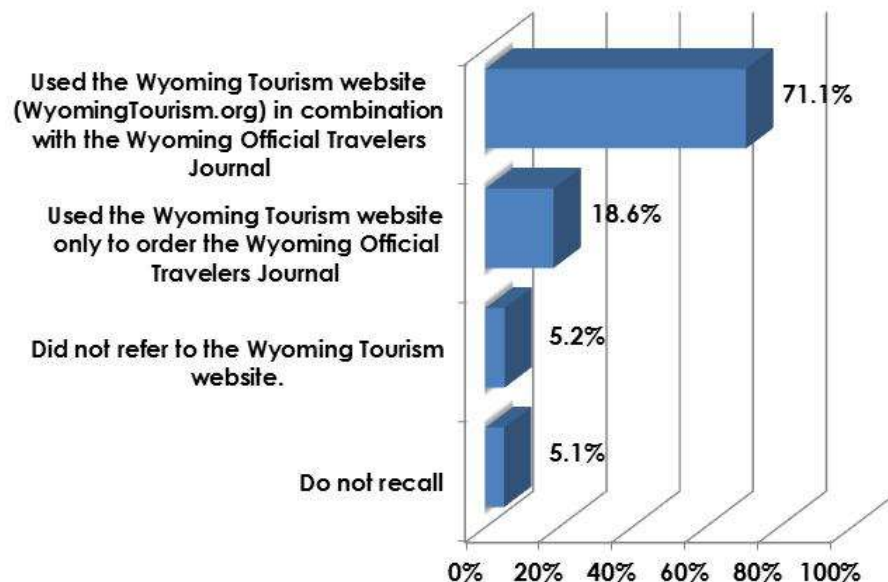
Question: How many other states did you consider for this trip? (Select one). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.



## Journal and Website Use

71.1 percent of Journal users who visited Wyoming used the official Wyoming Tourism website, WyomingTourism.org, in combination with the Wyoming Official Travelers Journal to help plan their recent trip. About one in five reported using the Wyoming Tourism website only to order the 2013 Wyoming Official Travelers Journal (18.6%), and 5.2 percent did not use the website at all.

**Chart 10: Journal and Website Use**



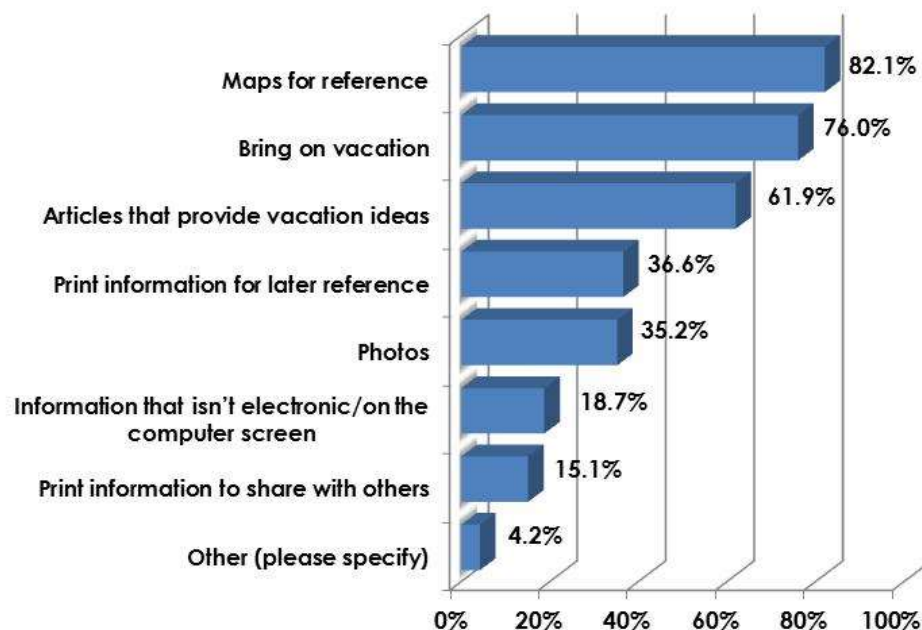
Question: Which of the following best describes how you planned your most recent visit to Wyoming? (Select one). Base: Journal users who visited Wyoming after receiving the Journal. 3,691 completed surveys.



## Reasons for Using Journal in Addition to Website

Those Journal users who traveled to Wyoming who used both the printed Journal and the Wyoming Tourism website to plan their trip were asked to report their reasons for using the printed Journal in addition to the state tourism website. The top reason for using the Journal was to reference maps (82.1%). Journal users also wanted to have the piece to bring along with them on their vacation (76.0%), and to read articles that provided them vacation ideas (61.9%).

**Chart 11: Reasons for Using Journal in Addition to Website**

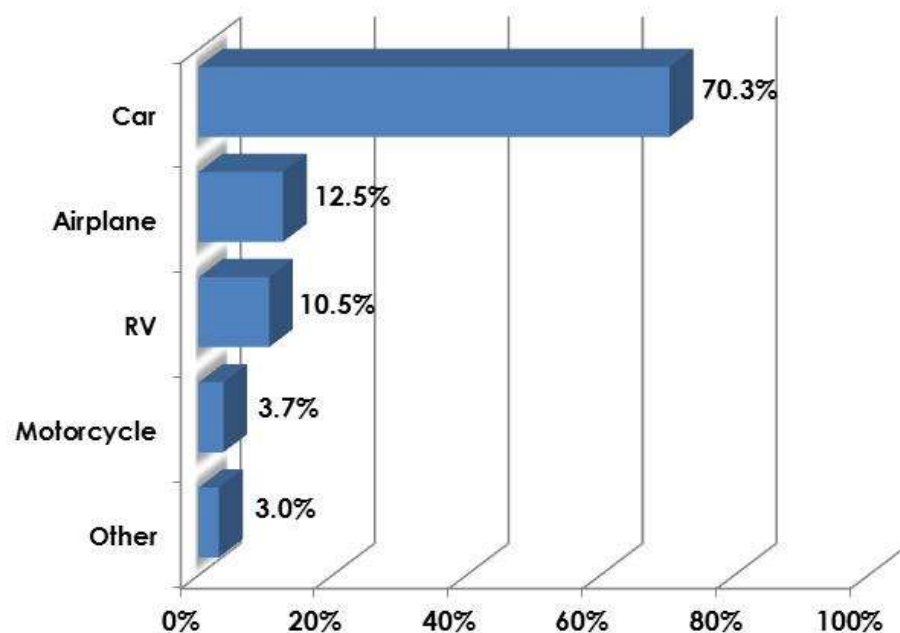


Question: Why did you use the Wyoming Official Travelers Journal in addition to the Wyoming Tourism website (WyomingTourism.org)? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal and used both the Journal and website to plan their trip. 2,625 completed surveys.

## Method of Arrival

Seven in ten Journal users who visited Wyoming arrived to the state via automobile (70.3%). Another 10.5 percent arrived in an RV. In total, 12.5 percent arrived in the state via airplane.

**Chart 12: Method of Arrival**

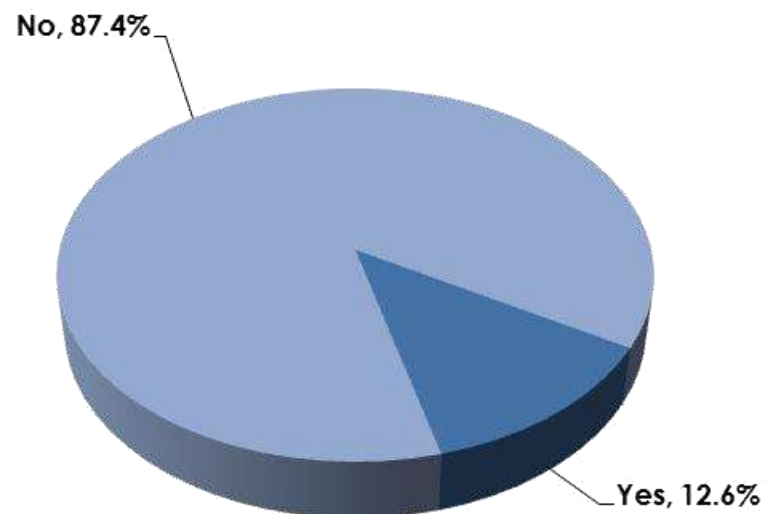


Question: How did you arrive in Wyoming? (Select one). Base: Journal users who visited Wyoming after receiving the Journal. 3,690 completed surveys.

## Car Rental in Wyoming

12.6 percent of Wyoming visitors rented a car or RV in Wyoming.

**Chart 13: Car Rental in Wyoming**

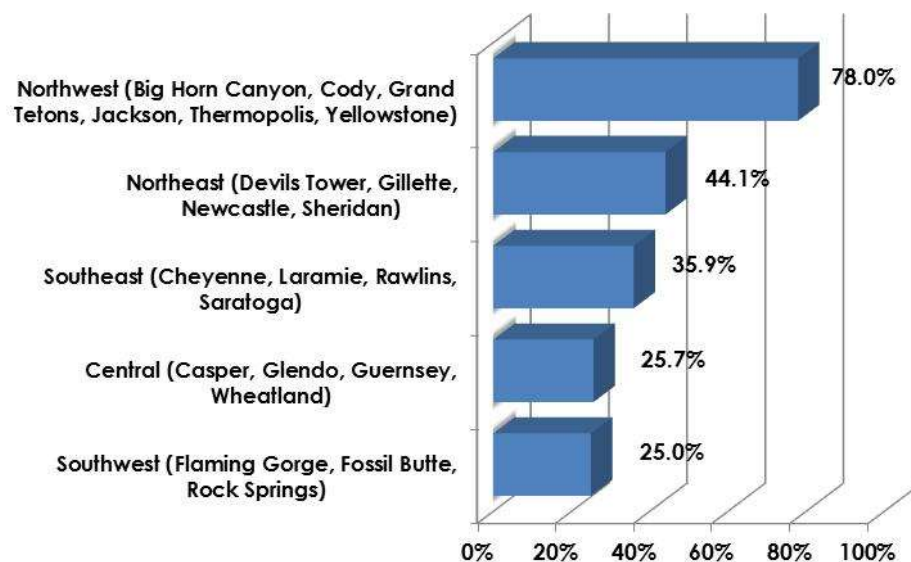


Question: Did you rent a car or RV in Wyoming? Base: Journal users who visited Wyoming after receiving the Journal. 3,690 completed surveys.

## Wyoming Regions Visited

The Northwest region of Wyoming is the most commonly visited area of the state by Journal users (78.0%), followed by the Northeast (44.1%) and Southeast (35.9%). One quarter of Journal users visited Wyoming's Central region (25.7%) and Southwest (25.0%).

**Chart 14: Wyoming Regions Visited**

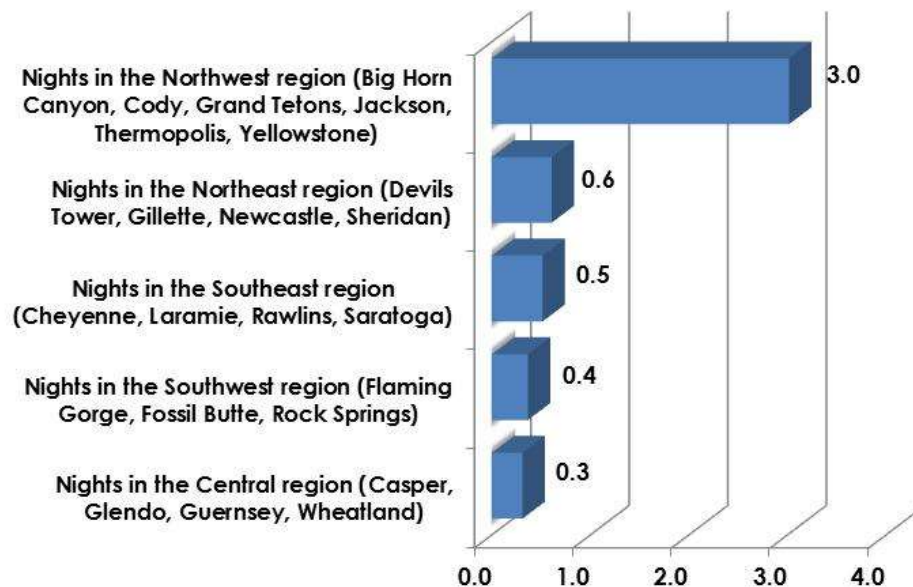


Question: Which of the following regions did you travel to during your most recent visit to Wyoming? Please refer to the map above. (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,681 completed surveys.

## Number of Nights in Wyoming Regions

Considering that Wyoming's Northwest region is the most visited area of the state by Journal users, these visitors also spend the most number of nights in the region. Journal users who visited the state in 2013 spent an average of 3.0 nights in the Northwest. The average Journal user who visited Wyoming spent a total of 4.8 nights in the state.

**Chart 15: Number of Nights in Wyoming Regions**



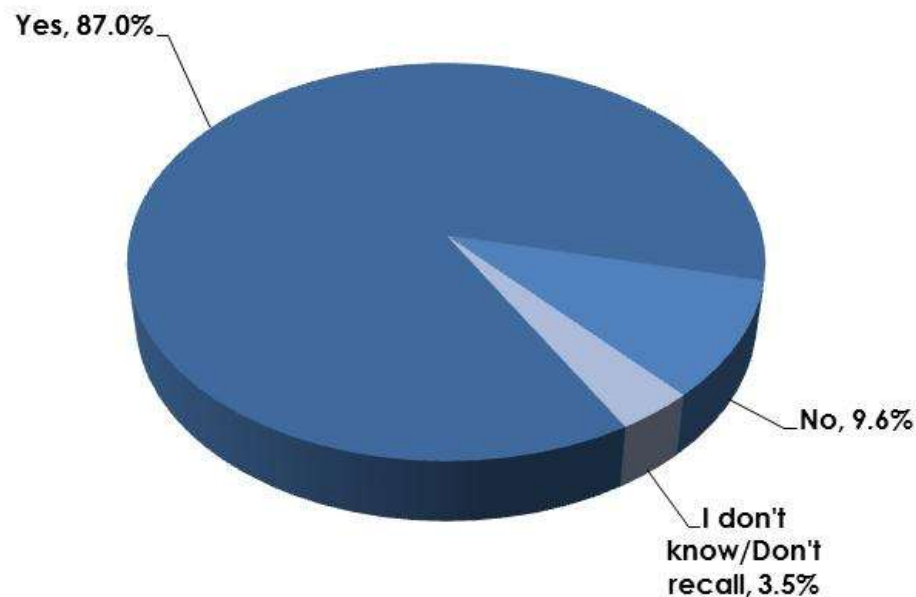
Question: How many nights did you spend in the following Wyoming regions during your most recent visit? Please enter a numeric value in the fields below. Base: Journal users who visited Wyoming after receiving the Journal. 9,035 completed surveys.



## Journal Brought to Wyoming

87.0 percent of Journal users who visited Wyoming brought the Journal with them on their trip.

**Chart 16: Journal Brought to Wyoming**

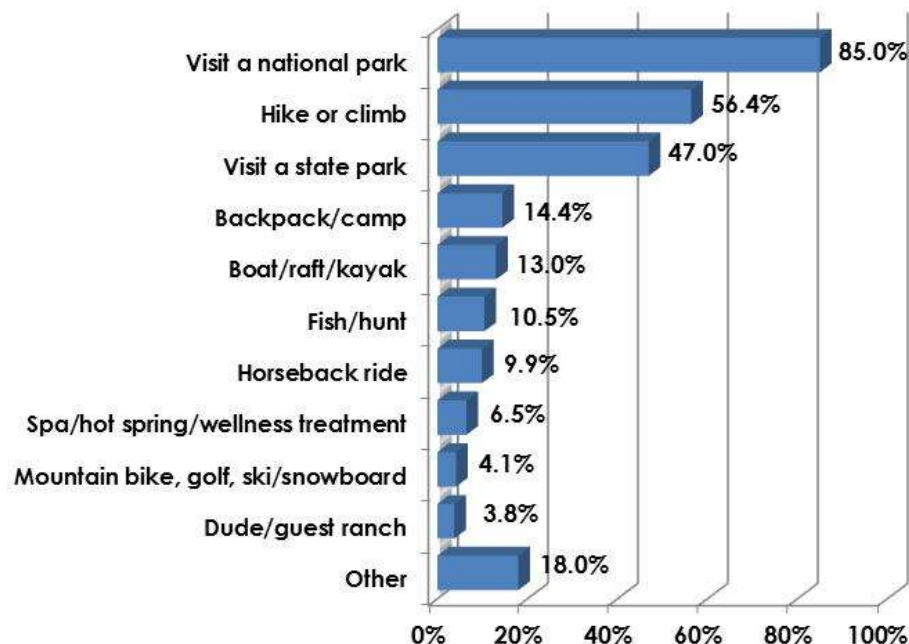


Question: Did you bring the Wyoming Official Travelers Journal with you when you traveled to Wyoming? Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Outdoor Recreation Activities

Journal users who visited Wyoming engaged in a variety of outdoor recreation activities while in the state, in particular visiting a national (85.0%) and/or state (47.0%) park, and hiking or climbing (56.4%).

**Chart 17: Outdoor Recreation Activities**



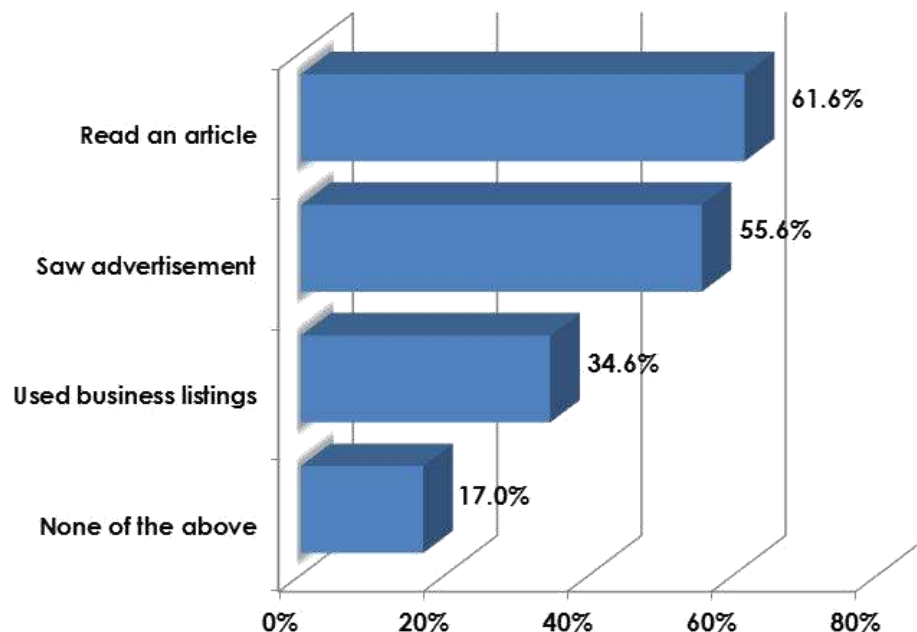
Question: In which of the following outdoor recreation activities did you participate during your Wyoming trip? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.



## Use of Journal in Outdoor Recreation Decisions

Journal users were apt to utilize the Journal's content to help them decide on their outdoor recreation activities during their trip (83.0%). 61.6 percent reported reading a Journal article to help with these decisions, while 55.6 percent used the advertisements and 34.6 percent used the business listings.

**Chart 18: Use of Journal in Outdoor Recreation Decisions**

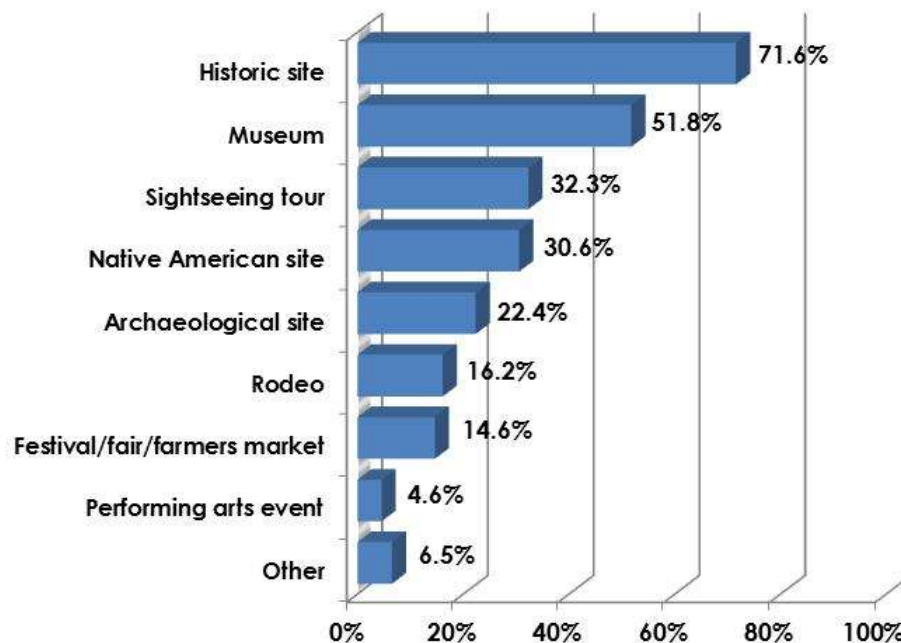


Question: In which of the following ways did you use the Wyoming Official Travelers Journal to help make decisions on outdoor recreation activities? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,688 completed surveys.

## Entertainment & Cultural Attractions Attendance

Journal users who traveled to Wyoming were asked about the entertainment and cultural related attractions they attended during their trip. 71.6 percent of Journal users who visited Wyoming went to a historic site during their Wyoming trip. Half went to a museum (51.8%), while approximately one in three went on a sightseeing tour (32.3%) and/or visited a Native American site (30.6%).

**Chart 19: Entertainment & Cultural Attractions Attendance**

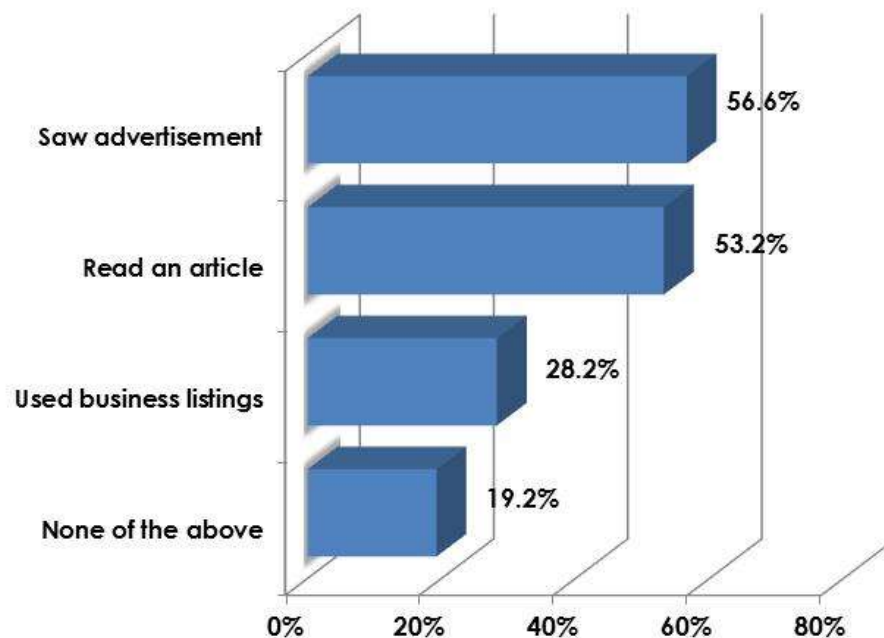


Question: Which of the following entertainment or cultural attractions did you attend during your Wyoming trip? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Use of Journal in Entertainment or Cultural Attractions Decisions

There is strong usage of the Journal to make trip decisions related to entertainment and cultural attractions. More than half of Journal users who traveled to Wyoming reported using the Journal's ad (56.6%) and/or articles (53.2%) to help them make decisions on entertainment or cultural attractions while in Wyoming. 28.2 percent used business listings in the Journal to help make these decisions.

**Chart 20: Use of Journal in Entertainment or Cultural Attractions Decisions**

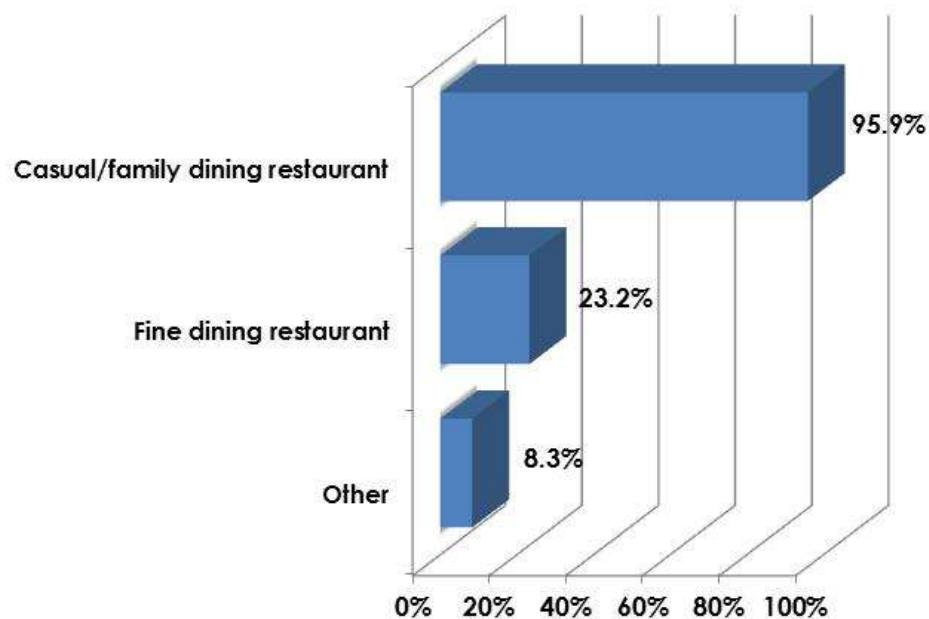


Question: In which of the following ways did you use the Wyoming Official Travelers Journal to help make decisions on entertainment or cultural attractions? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Dining

Nearly all Journal users dined in a casual or family dining restaurant during their Wyoming trip (95.9%). About one in four reported going to one or more of Wyoming's fine dining restaurants (23.2%).

**Chart 21: Dining**

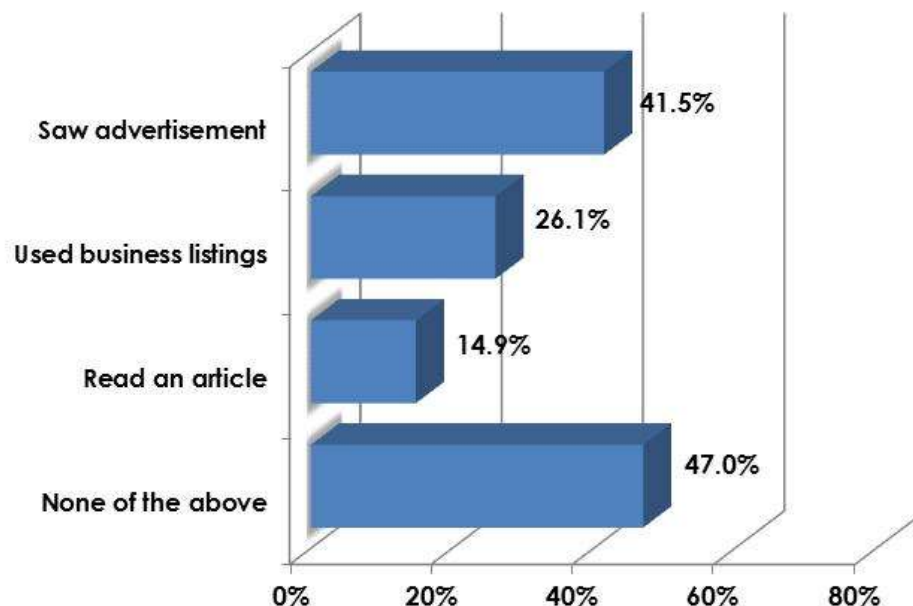


Question: In which of the following types of establishments did you dine during your Wyoming trip? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Use of Journal in Dining Decisions

53.0 percent of Journal users who traveled to Wyoming used the Journal to decide where to dine on their trip. 41.5 percent of Journal users used an advertisement, 26.1 percent used business listings and 14.9 percent used one of the Journal's articles to assist in their dining decisions during their Wyoming trip.

**Chart 22: Use of Journal in Dining Decisions**

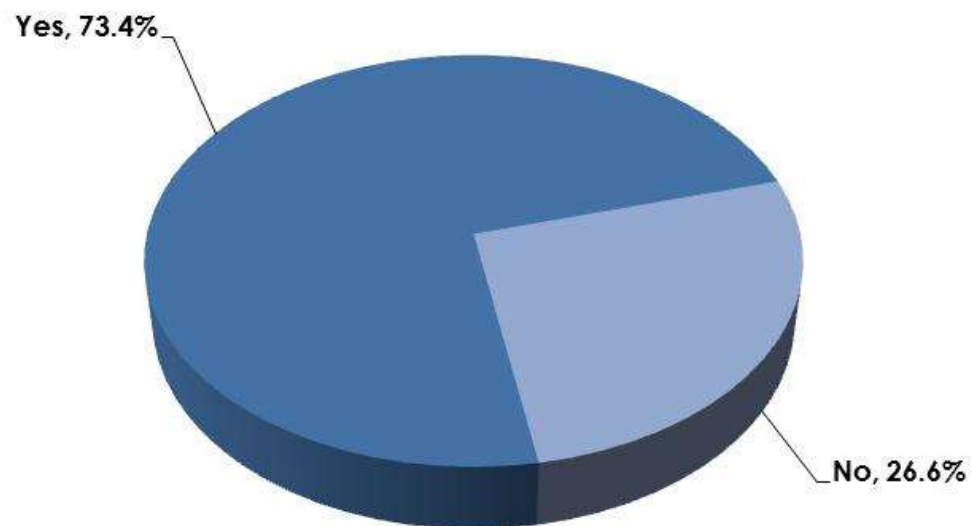


Question: In which of the following ways did you use the Wyoming Official Travelers Journal to help make decisions on dining? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Shopping

Nearly three-quarters of Journal users went shopping during their Wyoming trip (73.4%).

**Chart 23: Shopping**



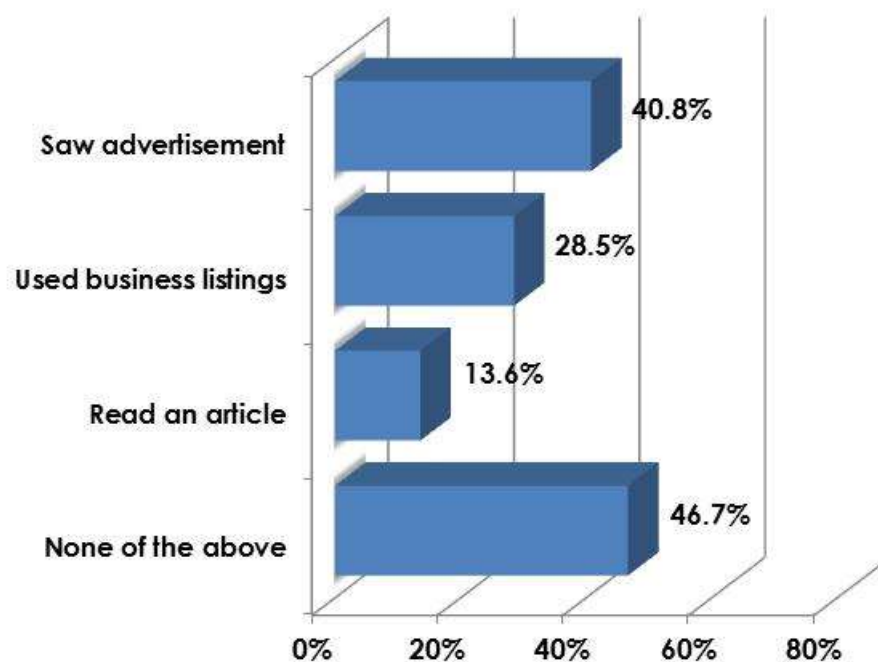
Question: Did you go shopping during your Wyoming trip? Base: Journal users who visited Wyoming after receiving the Journal. 3,688 completed surveys.



## Use of Journal in Shopping Decisions

Over half of those Journal users who went shopping in Wyoming used the Official Travelers Journal to make shopping related decisions. 40.8 percent used ads, 28.5 percent used business listings and 13.6 percent used an article.

**Chart 24: Use of Journal in Shopping Decisions**



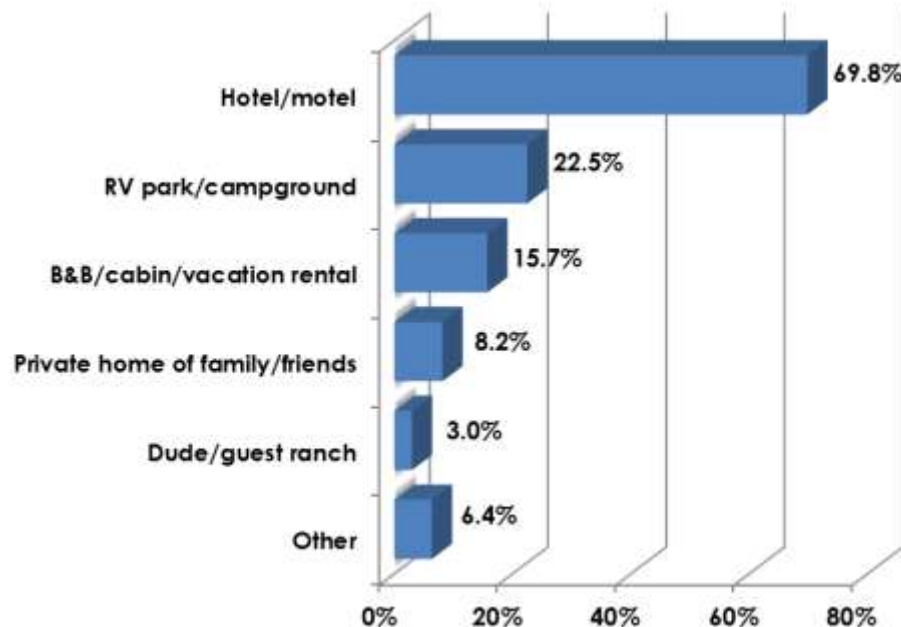
Question: In which of the following ways did you use the Wyoming Official Travelers Journal to help make decisions on shopping? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal and went shopping in Wyoming. 2,707 completed surveys.



## Lodging

A hotel or motel is by far the most common form of lodging during a Wyoming trip amongst Journal users (69.8%). 22.5 percent of Journal users stayed at an RV park or campground, while 15.7 percent used a bed & breakfast, cabin or vacation rental. Less than ten percent stayed in the private residence of a friend or family member (8.2%) or at a dude ranch (3.0%).

**Chart 25: Lodging**

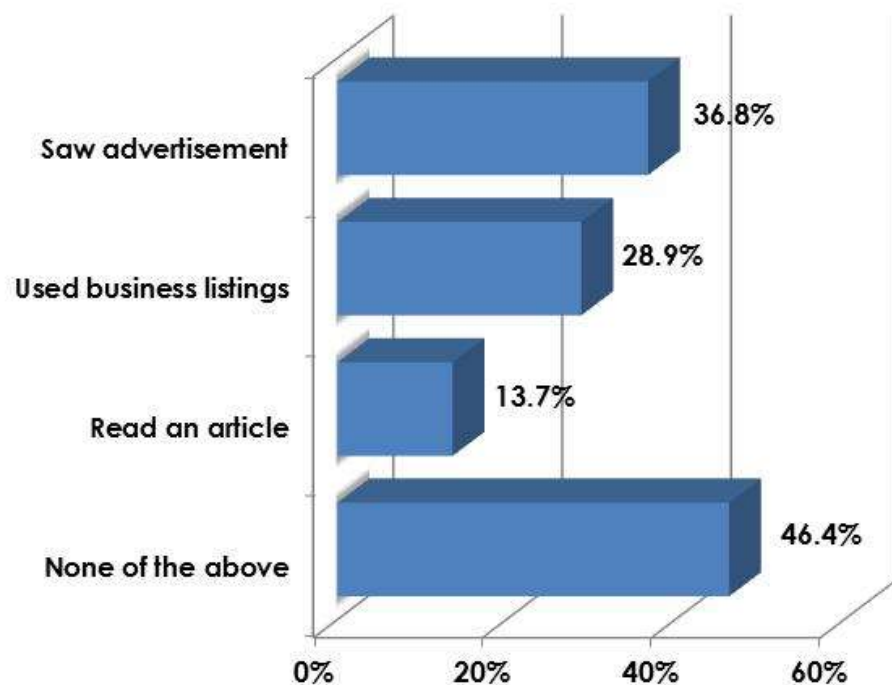


Question: While on this trip, where did you stay in Wyoming? (Select all that apply).  
 Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Use of Journal in Lodging Decisions

Over one-third of Journal users who visited Wyoming used an ad in the Wyoming Official Travelers Journal to decide on a place of stay (36.8%). 28.9 percent used the Journal's business listings and 13.7 percent read an article to make this decision.

**Chart 26: Use of Journal in Lodging Decisions**

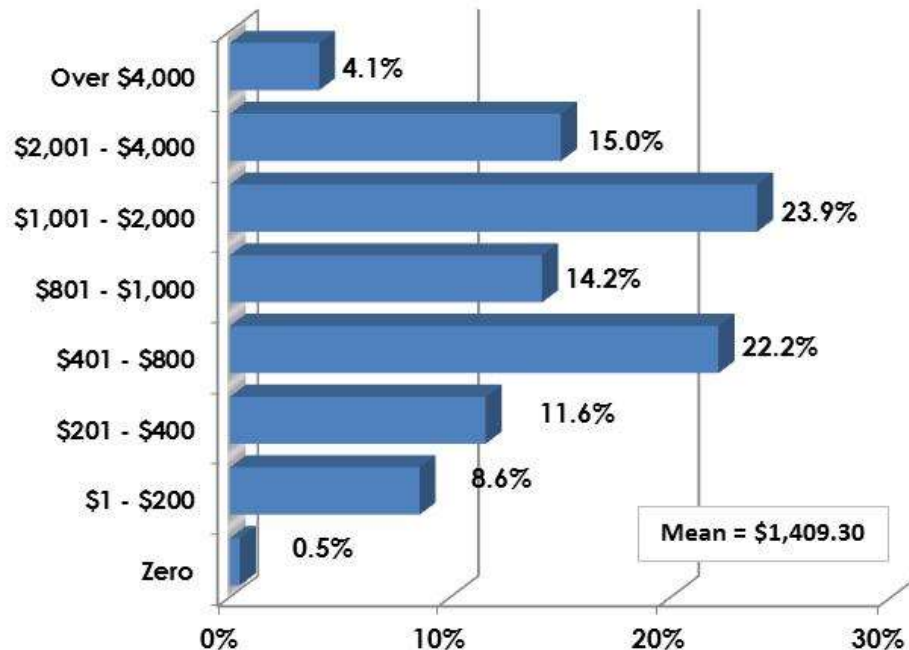


Question: In which of the following ways did you use the Wyoming Official Travelers Journal to help make decisions on lodging? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Spending in Wyoming

Journal users who traveled to Wyoming after receiving the guide spent a total of \$1,409.30 (excluding airfare and gasoline) on average during this most recent trip to Wyoming.

**Chart 27: Spending in Wyoming**

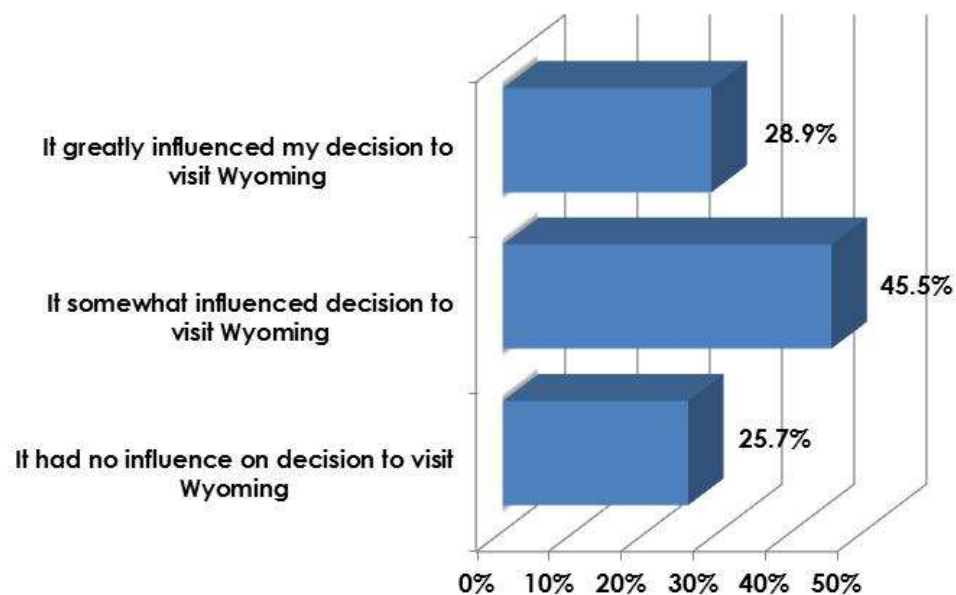


Question: Excluding airfare and gasoline, approximately how much did you spend IN TOTAL while on this most recent trip to Wyoming? Base: Journal users who visited Wyoming after receiving the Journal. 3,474 completed surveys.

## Journal's Influence on Decision to Visit Wyoming

Nearly 30 percent of Journal users that traveled to Wyoming agreed that the 2013 Wyoming Official Travelers Journal “greatly influenced” their decision to visit the state (28.9%). Another 45.5 percent report that the Journal was “somewhat” influential in their decision to visit. 25.7 percent report that the Journal had no influence on this decision.

**Chart 28: Journal's Influence on Decision to Visit Wyoming**

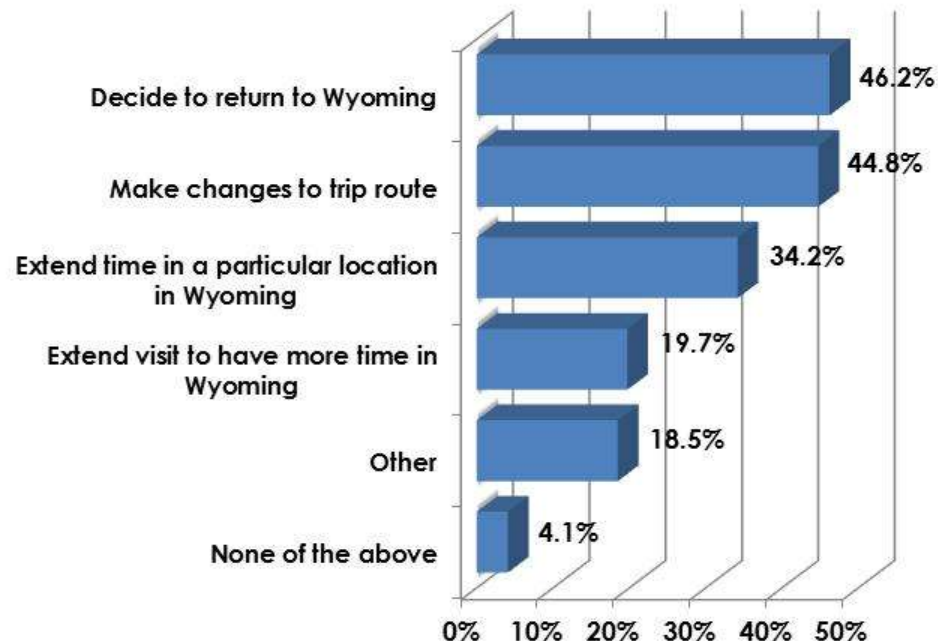


Question: How do you think the Wyoming Official Travelers Journal influenced your decision to visit Wyoming? Please select the one statement that best represents your opinion. Base: Journal users who visited Wyoming after receiving the Journal. 3,688 completed surveys.

## Journal's Influence on Wyoming Travel Plans

Information accessed in the 2013 Wyoming Official Travelers Journal made an impact on Journal users' Wyoming travel plans. 46.2 percent decided to return to Wyoming as a result of accessing information in the Journal and 44.8 percent of Journal users who traveled to Wyoming reported that the Journal influenced them to change their trip route. The Journal also led to extended time in a particular Wyoming location (34.2%) as well as more trip days than originally planned in order to spend more time in the state (19.7%).

**Chart 29: Journal's Influence on Wyoming Travel Plans**



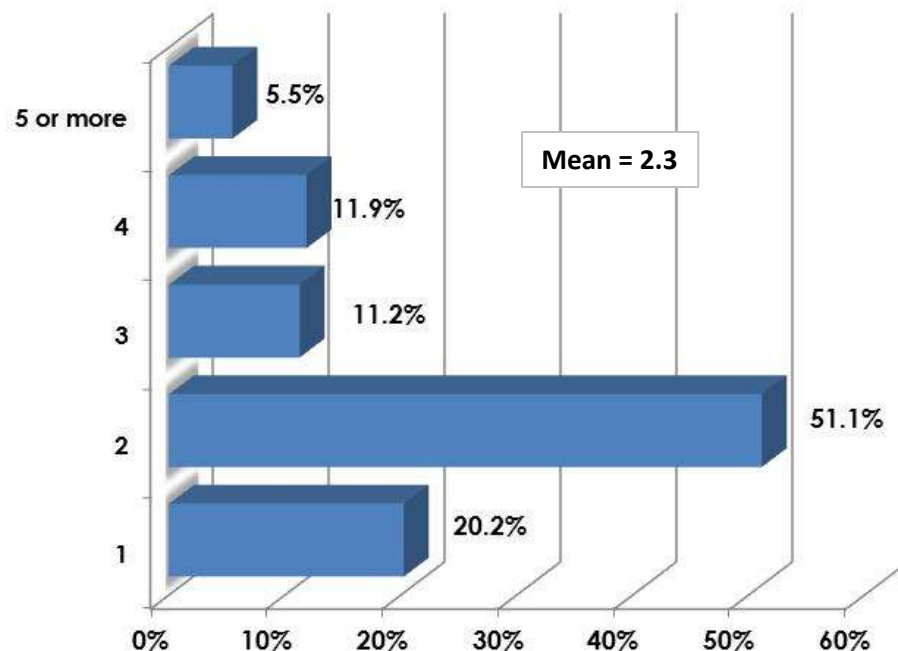
Question: Did the information you accessed in the Wyoming Official Travelers Journal influence you to do any of the following? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.



## Number of People who Used Official Travelers Journal

Journal users who traveled to Wyoming were asked how many people in their immediate travel party used the 2013 Wyoming Official Travelers Journal. On average, 2.3 persons within a travel party used the Journal.

**Chart 30: Number of People who used Journal**

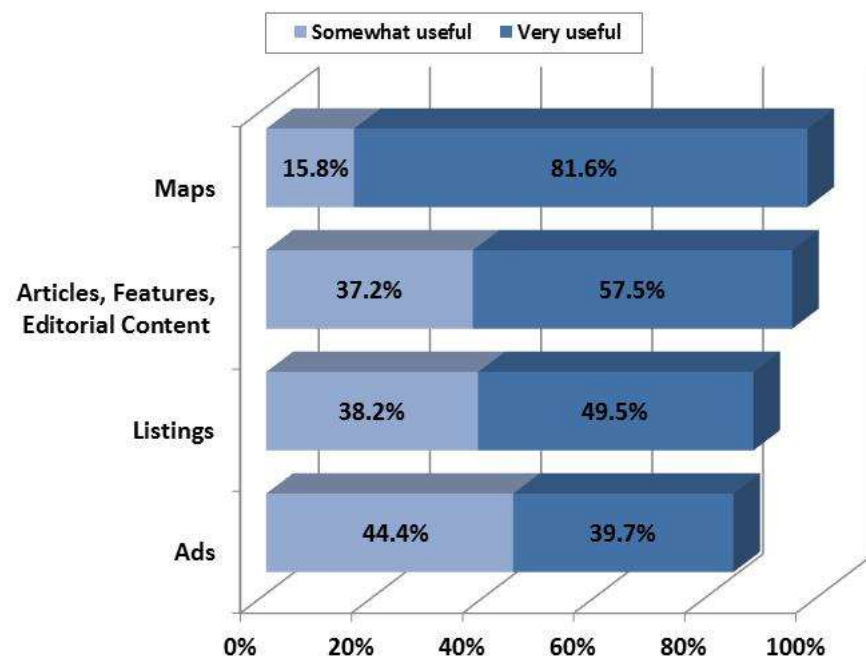


Question: Including yourself, how many people in your immediate travel party used the Wyoming Official Travelers Journal? Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Usefulness of Journal's Content

Survey respondents were asked to rate the utility of the Journal's content types. All were rated as at least "somewhat useful" by nearly 85 percent of these Wyoming visitors. The chart at right shows the percentage that rated each content type as "somewhat useful" or "very useful." The Journal's maps (97.4%) in particular and articles/features/editorial content (94.7%) were considered the most useful content, followed by listings (87.7%) and then the ads (84.1%).

**Chart 31: Usefulness of Journal's Content**



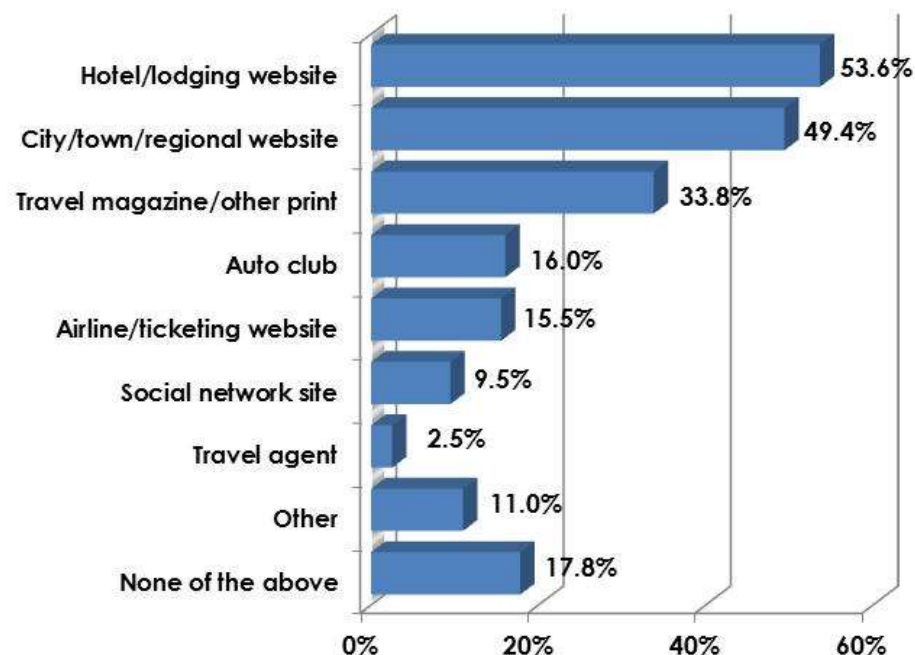
Question: In general, how useful did you find the following items in the Wyoming Official Travelers Journal? Please use the scale below from "Not at all useful" to "Very useful." Base: Journal users who visited Wyoming after receiving the Journal. 3,688 completed surveys.



## Travel Resources Used Before Arrival

Journal users were presented a list of travel resources and asked which they used to plan their Wyoming trip before arrival in the state. About half of these Wyoming visitors report using a hotel/lodging site (53.6%) and a city/town/regional website (49.4%) to help plan their visit prior to arriving in Wyoming. One third used a travel magazine or other print publication (33.8%).

**Chart 32: Travel Resources Used Before Arrival**

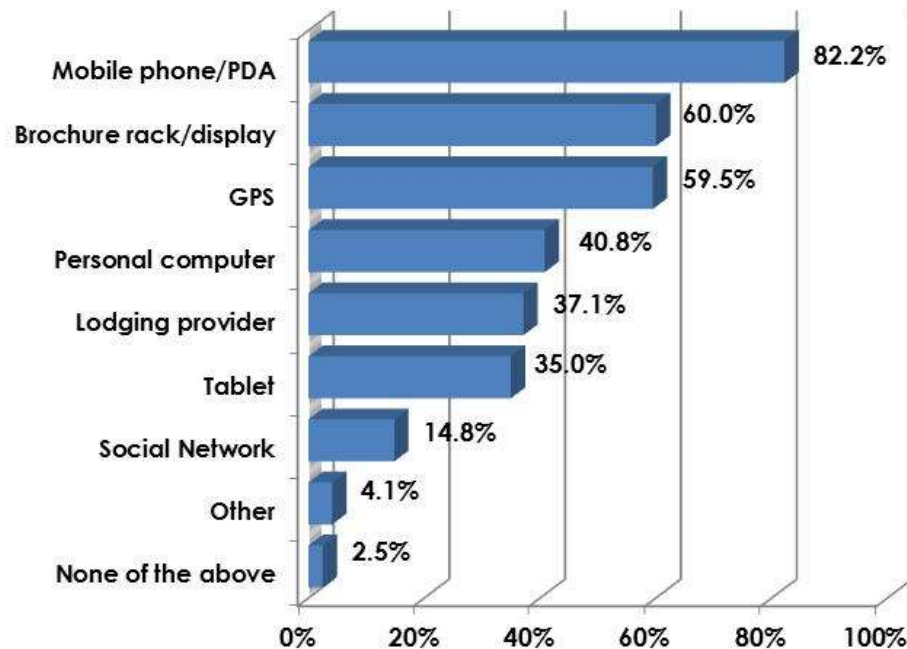


Question: Which of the following resources did you use to plan your Wyoming trip before arriving? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Travel Resources Used While in Wyoming

While fully 60.0 used brochure racks/displays to travel plan in-market, Journal users remain online during their Wyoming trip. Use of a personal computer has decreased, while use of mobile has increased. 82.2 percent of Journal users who visited Wyoming accessed information on their mobile phone or PDA while in Wyoming, up from 70.6 percent in 2012. 40.8 percent of 2013 Journal users used a personal computer to travel plan while in Wyoming, down from 51.7 percent in 2012. Tablets (not tracked last year) were used by 35 percent for trip planning in-market. About 60 percent used a GPS (59.5%) as a travel planning resource while in the state.

**Chart 33: Travel Resources Used While in Wyoming**

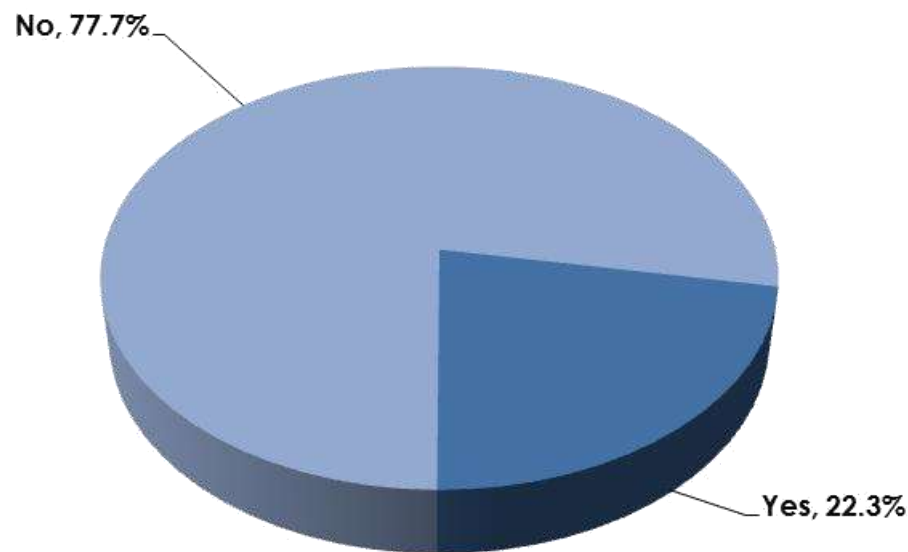


Question: Which of the following resources did you use while in Wyoming? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal. 3,689 completed surveys.

## Use of Electronic Version of Journal

22.3 percent of Journal users who traveled to Wyoming also downloaded or viewed an electronic version of the Wyoming Official Travelers Journal.

**Chart 34: Use of Electronic Version of Journal**

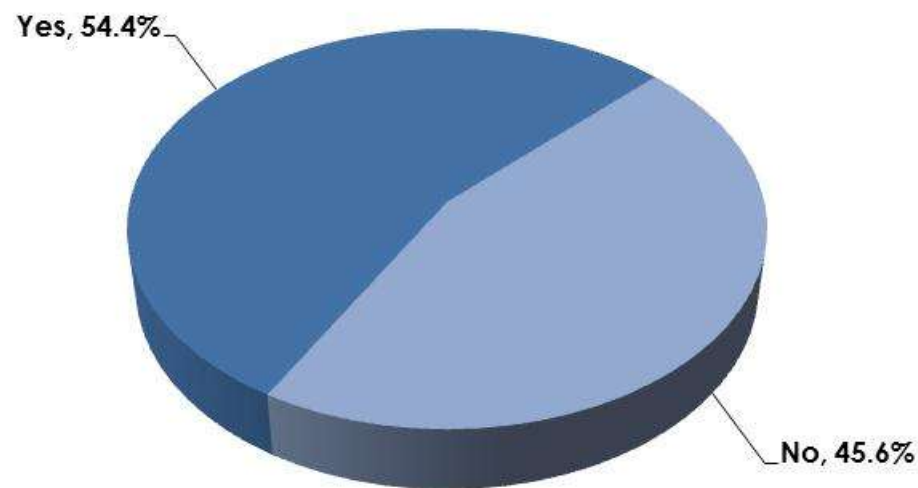


Question: Did you download or view an electronic version of the Wyoming Official Travelers Journal? Base: Journal users who visited Wyoming after receiving the Journal. 3,688 completed surveys.

## Wyoming Advertising

Over half of Journal users who traveled to Wyoming recall seeing or hearing some advertising about the state of Wyoming in the past 6 months (54.4%).

**Chart 35: Wyoming Advertising**

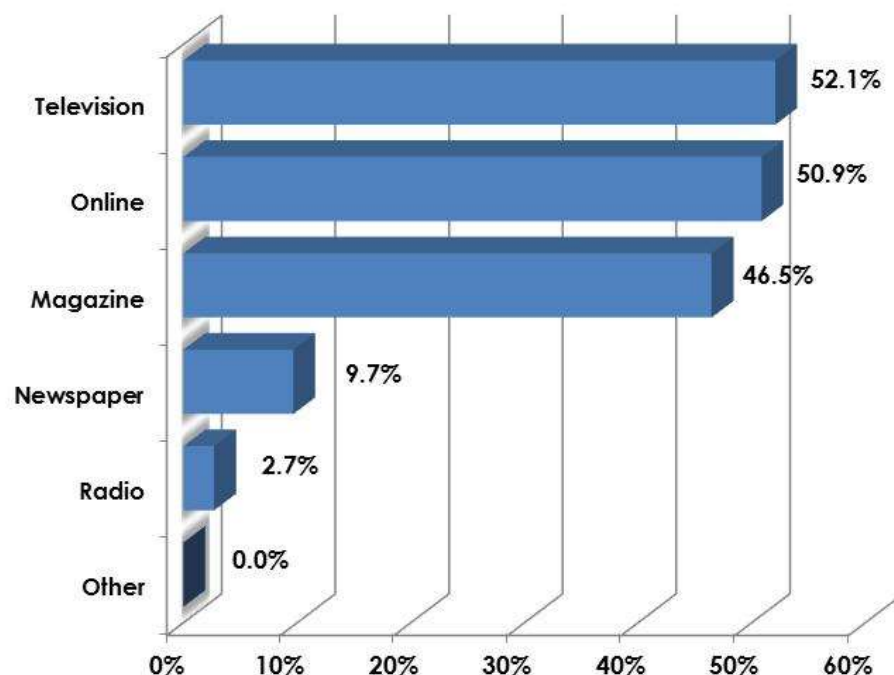


Question: In the past 6 months, do you recall seeing or hearing any advertising about visiting Wyoming? Base: Journal users who visited Wyoming after receiving the Journal. 3,148 completed surveys.

## Media Wyoming Advertising Recalled In

Those survey respondents who recalled seeing or hearing any advertising about Wyoming were asked to report in which media they recalled such advertising. Wyoming advertising was most commonly seen on television (52.1%), online (50.9%) and in magazines (46.5%). Recall across all media is up slightly from 2012.

**Chart 36: Media Wyoming Advertising Recalled In**



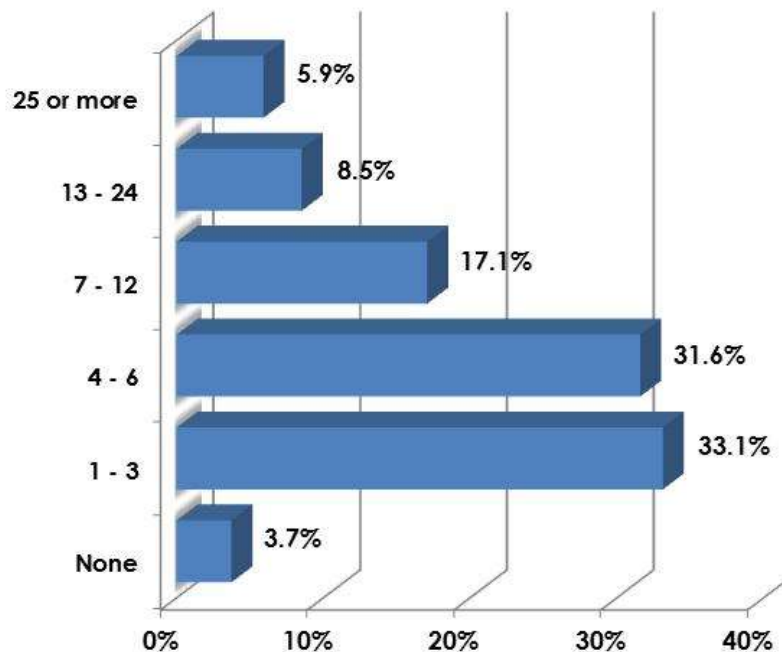
Question: In which of the following do you recall seeing or hearing about Wyoming? (Select all that apply). Base: Journal users who visited Wyoming after receiving the Journal and recall seeing advertising about Wyoming. 1,663 completed surveys.



## Number of Overnight Trips in the Past Twelve Months

Nearly all Journal requestors have made at least one or more overnight trips in the past 12 months (96.3%). The largest proportion of respondents made 1-3 overnight trips in the past year (33.1%).

**Chart 37: Number of Overnight Trips in the Past Twelve Months**



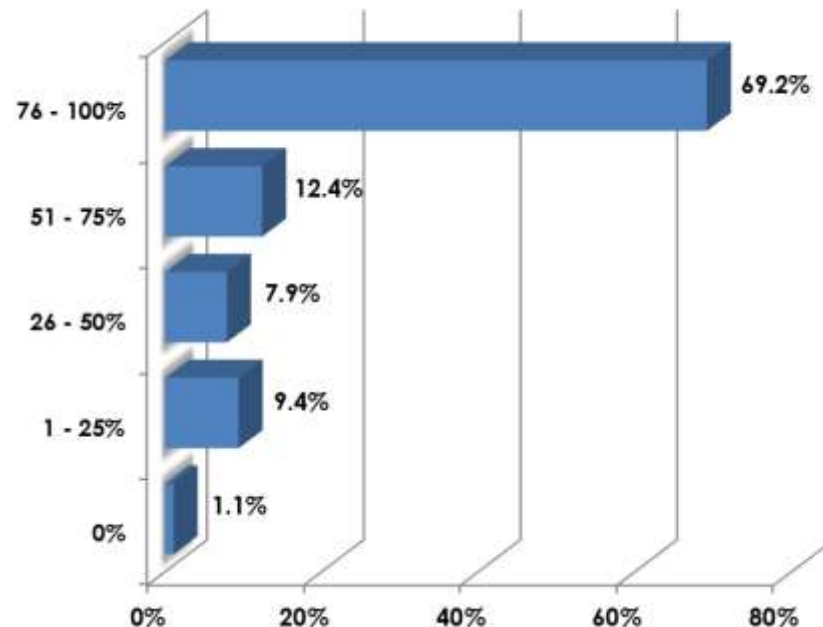
Question: In the past 12 months, how many overnight trips (to destinations 50 or more miles away from home) have you taken? (Select one). Base: All respondents. 9,035 completed surveys.



## Percentage of Overnight Trips which were Leisure Trips

Nearly 70 percent of Journal requestors (69.2%) report that 76 – 100% of their overnight trips in the past twelve months were for leisure purposes.

**Chart 38: Percentage of Overnight Trips which were Leisure Trips**

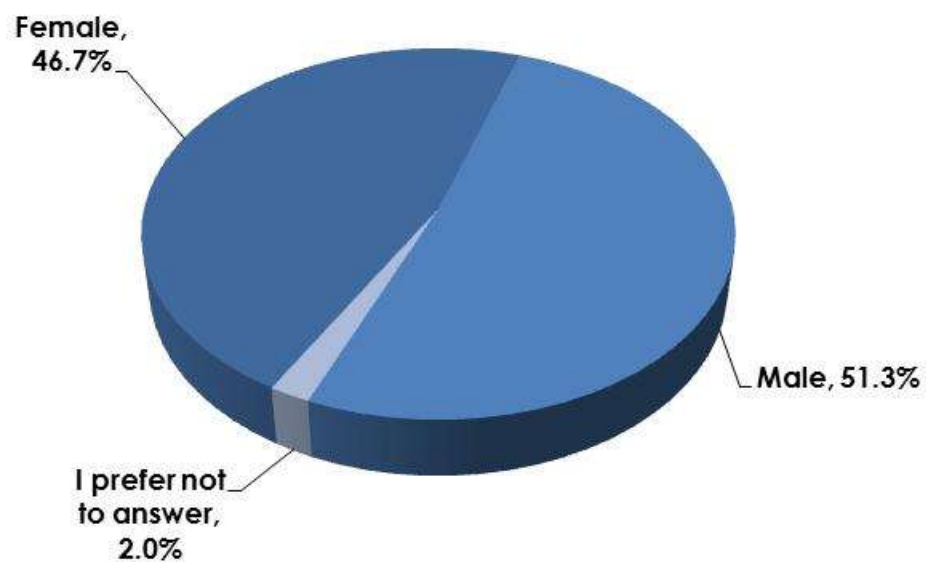


Question: What percentage of these trips in the past twelve months were primarily for recreation/pleasure? Base: All respondents. 9,009 completed surveys.

## Gender

Half of all survey respondents are male (51.3%) and 46.7 percent are female.

**Chart 39: Gender**

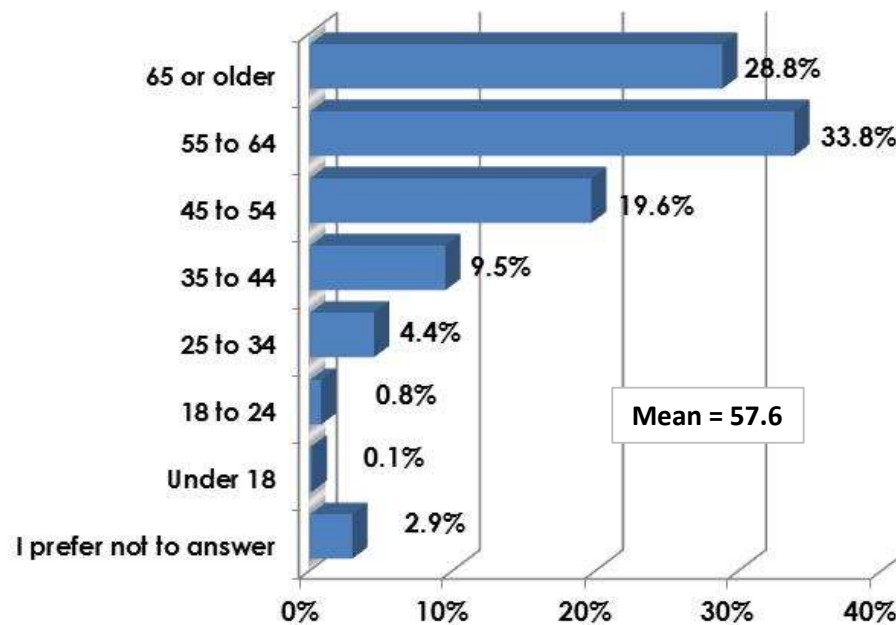


Question: What is your gender? (Select one). Base: All respondents. 9,034 completed surveys.

## Age

Over 80 percent of 2013 Wyoming Official Travelers Journal requestors are over 45 years of age (82.3%).

**Chart 40: Age**

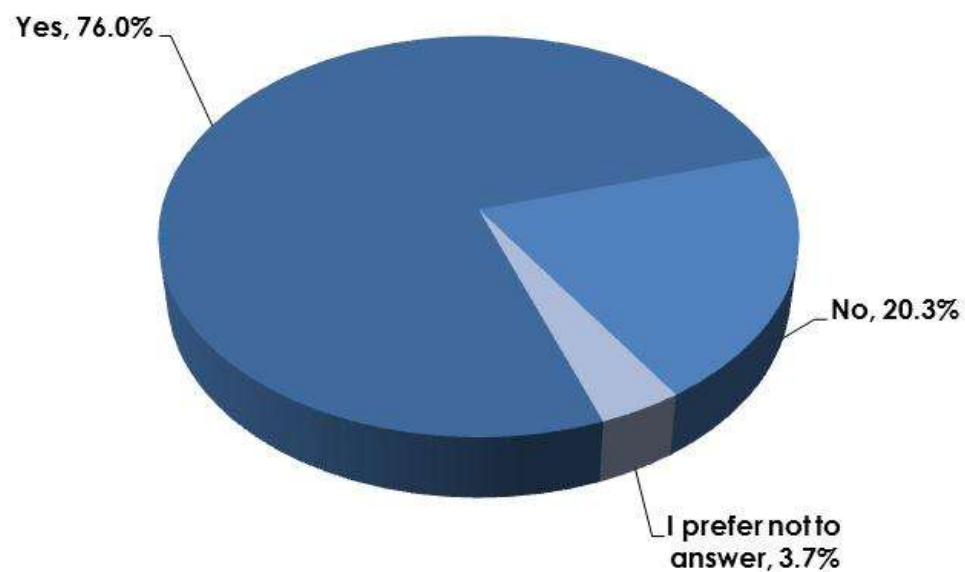


Question: What is your age? (Select one). Base: All respondents. 9,034 completed surveys.

## Marital Status

Three quarters of Journal requestors are married (76.0%).

**Chart 41: Marital Status**

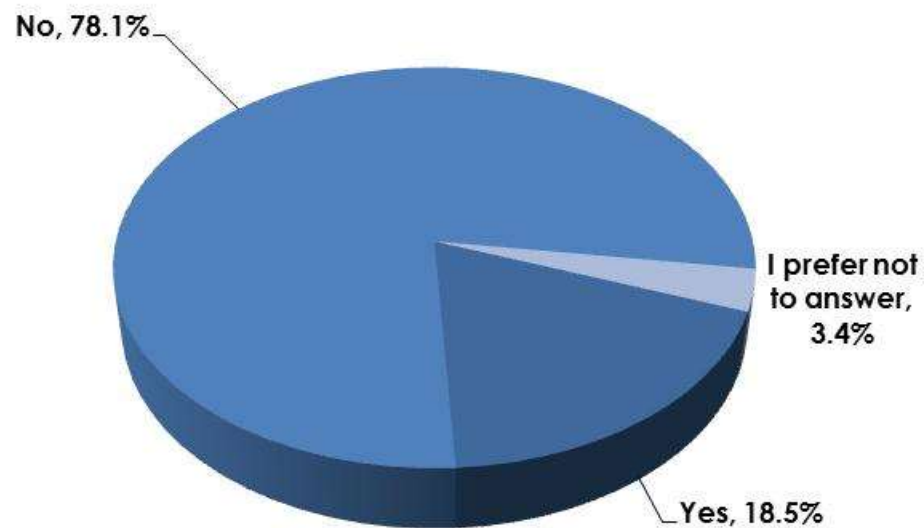


Question: Are you currently married? (Select one). Base: All respondents. 9,034 completed surveys.

## Children Under 18

About one in five Journal requestors has children under 18 living at home with them (18.5%).

**Chart 42: Children Under 18**

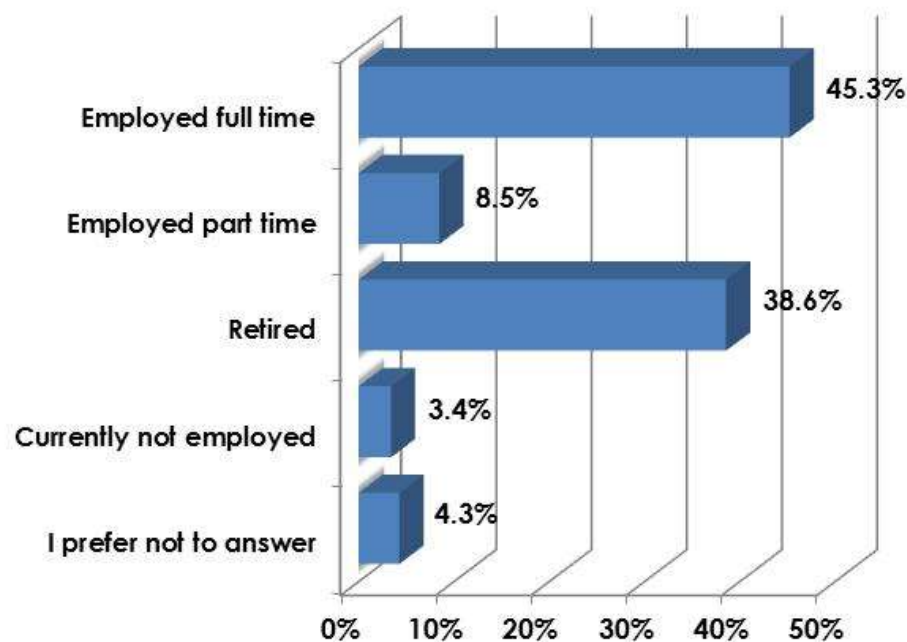


Question: Do you currently have any children under age 18 years old living at home with you? (Select one). Base: All respondents. 9,034 completed surveys.

## Employment

While 53.7 percent of Journal requestors is currently employed full-time or part-time, nearly four in ten is retired (38.6%).

**Chart 43: Employment**



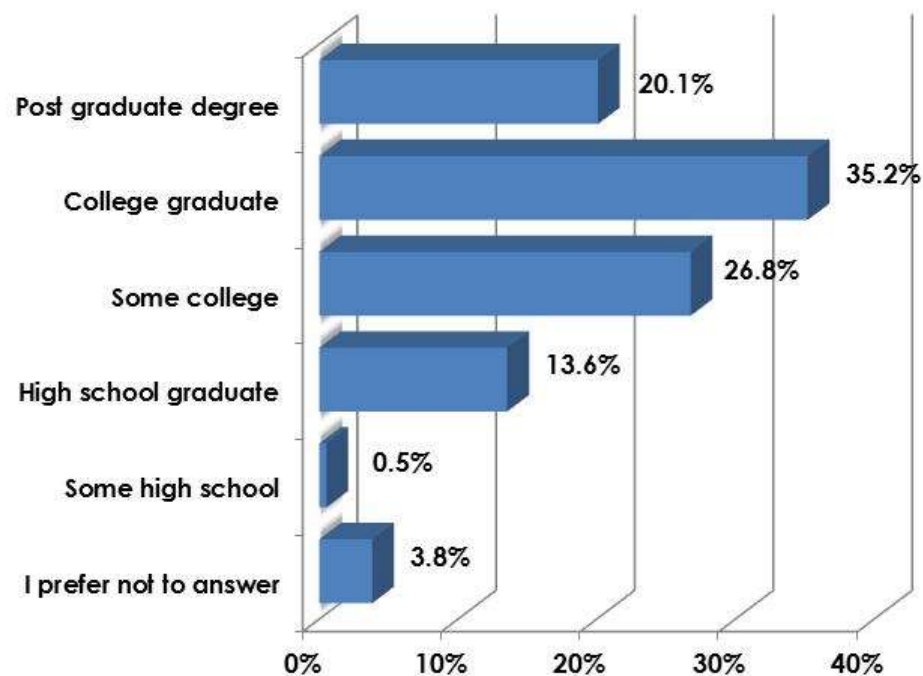
Question: Which of the following best describes your current employment status? (Select one). Base: All respondents. 9,034 completed surveys.



## Education

55.3 percent of Journal requestors is a college graduate, including 20.1 percent who hold a post-graduate degree.

**Chart 44: Education**

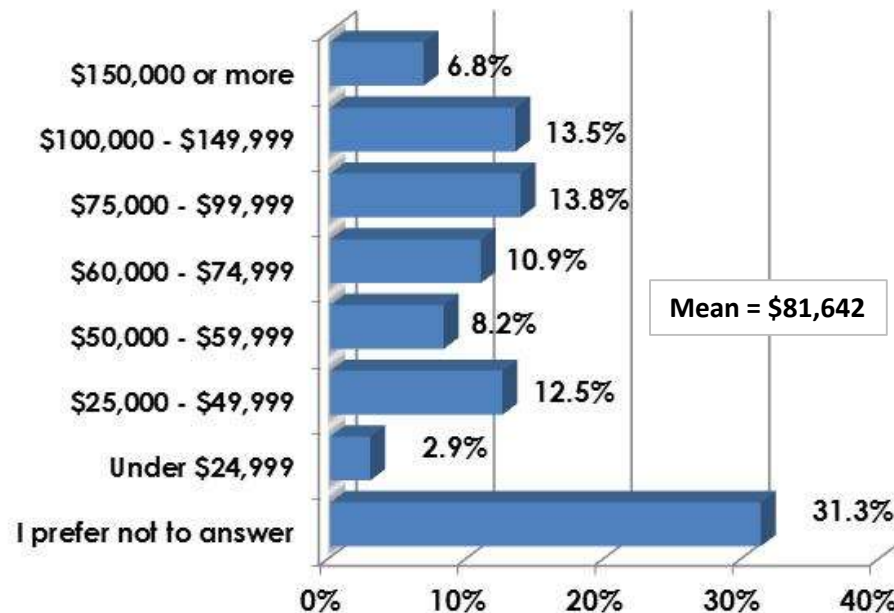


Question: Which of the following best describes your highest level of education? (Select one). Base: All respondents. 9,034 completed surveys.

## Annual Household Income

Over half of all survey respondents report an annual household income of \$50,000 or more (53.3%). The average annual household income of Journal requestors is estimated to be \$81,642.

**Chart 45: Annual Household Income**

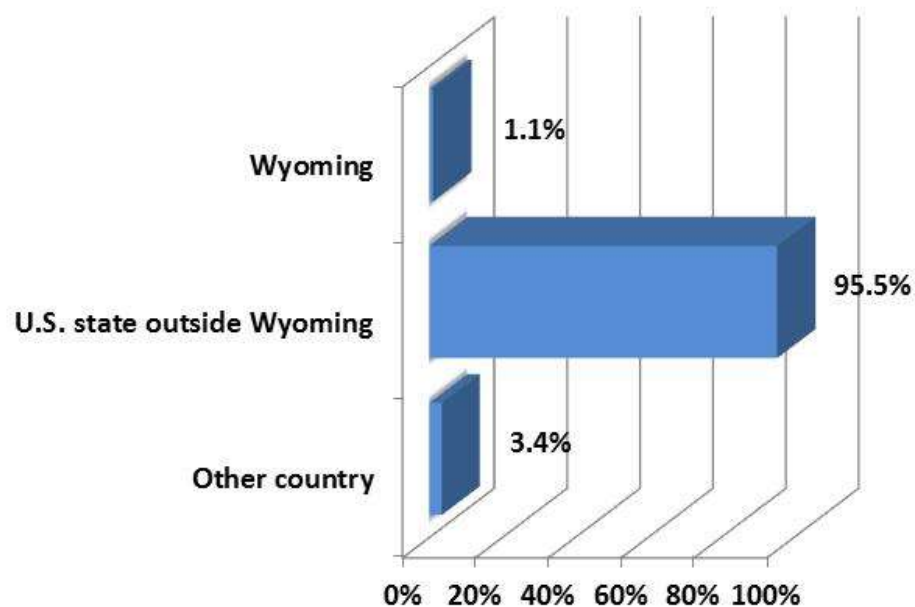


Question: Which best describes your annual household income? (Select one). Base: All respondents. 9,034 completed surveys.

## Residence

The vast majority of Journal requestors surveyed resides in the United States outside of Wyoming (95.5%). Only 1.1 percent is a Wyoming resident. 3.4 percent of requestors reside outside the United States.

**Chart 46: Residence**

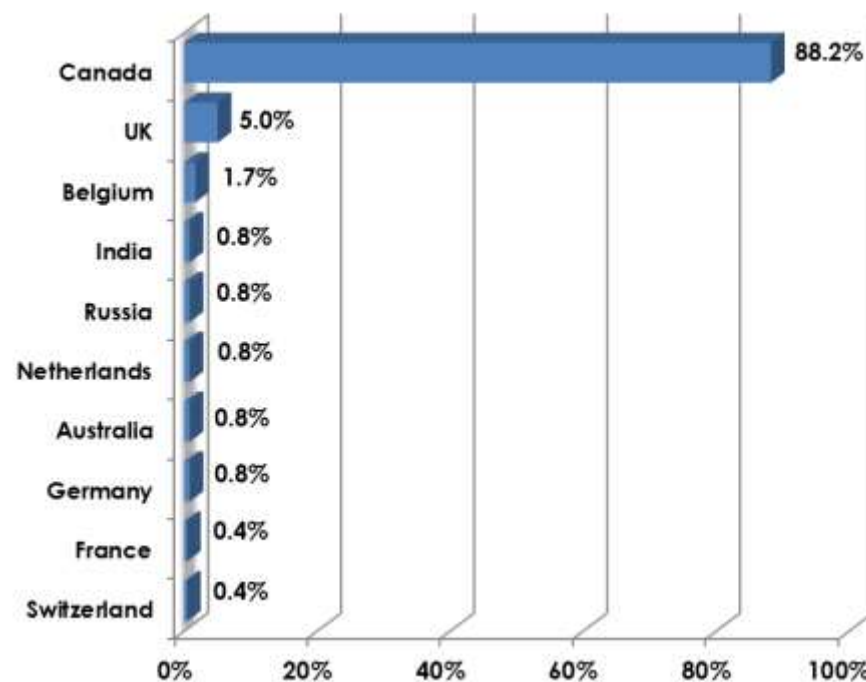


Question: Where do you currently live? (Select one). Base: All respondents. 9,035 completed surveys.

## Country of Residence

Nearly 90 percent of 2013 Journal requestors surveyed who live outside the United States reside in Canada (88.2%). 5.0 percent live in the United Kingdom. [Note: The survey was available in English only.]

**Chart 47: Country of Residence**



Question: If you selected "Other country" above, please specify in the field below.  
Base: Respondents who live outside the United States. 238 completed surveys.